

Can you spare a moment for your future?

Your Financial Health Check Questionnaire

Please circle the appropriate box

Has your employment situation changed since your last review?	Yes	No
Have you made provision for your protection needs?	Yes	No
Would you like a review of your: a) Life Assurance Cover?	Yes	No
b) Critical Illness Cover?	Yes	No
c) Income Replacement Cover?	Yes	No
Have you made provision for your retirement?	Yes	No
Would you like to discuss the benefits of your Company pension scheme?	Yes	No
Have you safeguarded against the shortfalls of your Company pension scheme?	Yes	No
Do you wish to have your existing private/personal pensions reviewed?	Yes	No
Have you made provision for your investment and saving needs?	Yes	No
Would you like a review of your Savings/Investments and their asset allocation/risk profile?	Yes	No
Do you require any assistance with regard to mortgages or re-mortgaging?	Yes	No
Have you reviewed your property's buildings and contents insurance?	Yes	No
Do you have Private Medical Insurance?	Yes	No
Have you considered insurance against redundancy?	Yes	No
Have you made a Will or a Lasting Power of Attorney?	Yes	No
If yes is it tax efficient or has it been reviewed to meet your current wishes?	Yes	No
Have you considered a pre-paid funeral plan for peace of mind?	Yes	No
Is there any other area of concern that you would like to discuss?	Yes	No
Would you like an annual review of your circumstances?	Yes	No
Would you prefer a more frequent review?	Yes	No
Three Monthly <input type="checkbox"/> Four Monthly <input type="checkbox"/> Six Monthly <input type="checkbox"/>		
How do you prefer to have your review?		
By letter? <input type="checkbox"/> By telephone? <input type="checkbox"/> By e-mail? <input type="checkbox"/> A personal visit? <input type="checkbox"/> A combination? <input type="checkbox"/>		
Do you wish to receive information that we may consider of interest to you?	Yes	No
Do you wish to receive a regular newsletter covering varied financial topics of interest?	Yes	No

Please ensure that we have your correct contact details:

Name			
Address			
		Postcode	
Home Phone		Office Phone	
Mobile Phone		E-mail	
Do you have any comments, suggestions, personal recommendations or referrals?		Yes	No

	<p>Grosvenor Beaumont Financial Services Limited Grosvenor Beaumont Financial Planning Limited</p> <p>Wise House, 38 Pinewood Drive, Potters Bar, Middlesex, EN6 2BD</p> <p>Jeff Barnes Cert PFS Cert CII (MP&ER) Direct Line Tel: 01707 660445 Mobile: 07785 765793 E-mail: info@gbfinancial.co.uk Web: www.gbfinancial.co.uk</p>	
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